

Advanced IROC Training: Student Guide

8. Maintaining Contracts in DMT

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1. Objectives

Upon completion of this unit, you will be able to:

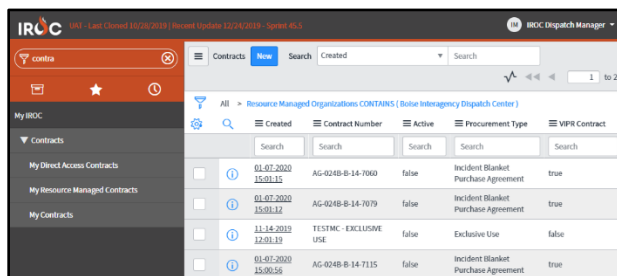
- Create a contract within IROC.
- View and edit existing contracts.
- Modify the managing dispatch center for a contract.
- Add or remove resource managed organizations and direct access organizations.
- Add or remove resources to or from a contract.
- Enable or disable a contract.
- Remove or restore a contract.

2. Contracts Overview

Dispatch managers can manage contracts relevant to the dispatch center they are logged into. This guide describes how to view, edit, and create contracts within the IROC Data Management Tool (DMT).

3. Navigating to the Contracts Modules

Multiple contracts modules are available under the **My IROC** application in the application navigator



- The **My Direct Access Contracts** module contains a list of contracts for which your current dispatch center has direct access to the listed resources.
- The **My Resource Managed Contracts** module contains contracts for which your current dispatch center can manage listed resources.
- The **My Contracts** module contains contracts for which your current dispatch center is listed as the managing dispatch center.

Contracts Record Access

A summary of role-based access for contracts functions is listed below. In general, you must be a member of the managing dispatch center on the contract to modify a contract.

Function	Role
View only	Dispatcher
Create, View, or Modify	Dispatch Manager

4. Creating a New Contract

To create a contract, choose any of the **Contracts** modules in the application navigator and click **New** in the top of the main content frame. For example, you can access contracts records from the **My IROC / My Contracts** application. Enter relevant information in the main form and in the tabbed section.

Note: Grayed-out fields cannot be edited.

Note: All items marked with an asterisk are required.

- Managing Dispatch Unit** will populate with your current dispatch center.

Note: Your default dispatch center is based on your current dispatch center. To change this, navigate to the **My IROC / My Dispatch Organizations** module.

- The **Managing Dispatch Unit** search list is limited to those organizational units to which you have access.
- A contract can have only one managing dispatch unit.

- Enter the **Contract Number*** provided by the contracting office.

- The number format is as follows: Agency Code (2 chars) - Office Code (4 characters) - Procurement Type (1 character) - Fiscal Year (yyyy) - Sequential Number (nnnn).

Notes: Contract numbers must be unique. The IROC system does not enforce the contract number format.

- Select **Procurement Type*** from the drop-down.

- Agreement** - A signed, formal arrangement with a vendor or other government unit to provide specific resources that are identified in the contract.
- Call When Needed** - An arrangement with a vendor to provide specific resources that are identified on an as-needed basis.
- Exclusive Use** - An agreement with a vendor to provide a specific resource for a definite period to a particular government unit for incident support.
- Incident Blanket Purchase Agreement** - A signed, formal arrangement with a vendor to provide a service in support of an incident, such as a copy machine rental, meals/groceries, or lodging.

- Indicate whether the contract is with a **Vendor** or **Government Non-Dispatch Organization***.

- Enter the contract **Begin Date*** and **End Date***.

Note: Once a contract is enabled, IROC will automatically set the contract to **Active** when the start date has passed and to **Inactive** once the end date has passed.

- The **Draft** checkbox will remain checked until you click **Enable Contract**.

- Check **Global Access** if the contract is available globally.

Note: Global access will allow all dispatch units to fill requests with resources from this contract.

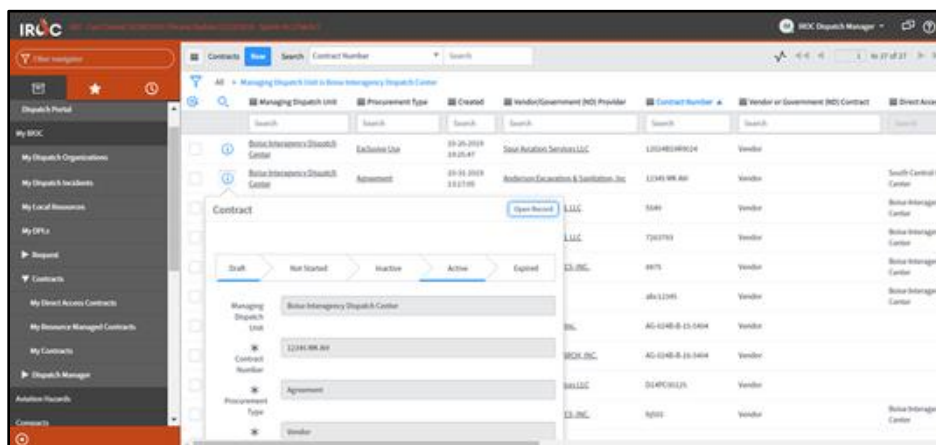
- 8 On the Organizations tab, choose a **Vendor/Government Provider** from the list of available vendors and government non-dispatch units. If an alert box pops up, click **OK**.
 - a If your required provider is not listed, check the **Vendor / Government Provider Not Available** box and enter a provider that needs to be entered into IROC. You can add supporting documentation to assist with the creation of the vendor organization by clicking the **Attachment** icon (paperclip) in the header bar.
- Note:** If the vendor is not available, the contract cannot be moved out of the draft stage.
- 9 Choose a **Contracting Office Provider** from the list of government non-dispatch organizations.
- 10 Complete the following optional fields if relevant.
 - a **FS Region Organizations** - Check to limit organizations available to Forest Service regional offices.
 - b **Resource Managed Organizations** - Click the **Lock** icon and select one or more organizations that can add and remove resources to the contract from the list of dispatch centers. Dispatch managers at units listed under **Resource Managed Organizations** can add and remove resources to and from the contract.
 - c **Direct Access Organizations** - Click the **Lock** icon and select one or more organizations that can directly access resources on the contract from the list of dispatch centers. Dispatchers at units listed under **Direct Access Organizations** can use resources from the contract to fill requests.
- 11 When done, click **Submit** at the top or bottom of the screen to save your contract record in IROC.

Note: You can also click **Enable Contract** to save your contract in IROC and place it into the active state, as long as the begin date for the contract has passed.

Tip: Once a contract has been created, the Activities tab will show all activity related to this content.

5. Viewing or Editing Existing Contracts

To view or edit existing contracts, choose the desired module from the application navigator; the records will be displayed in the main content frame. You can access contract records by selecting the desired module from the **My IROC / Contracts** application.



- 1 Use the search box, filters, and column sorting to find records.
- 2 To quickly view contract details, click the **Information** icon to the left of the record and click **Open Record** in the upper-right corner of the Contract preview screen.
- 3 To modify an opened record, edit the relevant fields and then click **Update**. For example, select a new **Managing Dispatch Unit** for the contract from the drop-down.

Note: To modify the contract's managing dispatch unit, you must be a dispatch manager at the organizational unit that is the managing dispatch of the contract.

Action Buttons for Viewing and Editing Contracts

Contract record screens may display action buttons allowing you to take quick action on a record.

- **Submit** – Click to save the record, which places the contract in the draft state.
- **Enable Contract** – Moves a contract from the draft state to an active/inactive state, depending on the begin and end date. A contract in the draft state must be enabled to make it available for use in IROC. You can enable a contract as soon as you create it or at any time after it is created.

The following screenshot shows a new draft contract that has not yet been submitted or enabled. If the begin date has not passed, clicking **Enable Contract** will bring up an alert stating that it will remain inactive until the start date has passed, at which time the contract will be enabled and active.

The screenshot shows the 'Contract record' screen for a new record. The top navigation bar includes 'Draft', 'Not Started', 'Inactive', 'Active', and 'Expired' tabs. The 'Draft' tab is selected. The form contains the following fields and options:

- Managing Dispatch Unit:** Boise Intergency Dispatch Center
- * Contract Number:** FS-BOID-A-2020-0021
- * Procurement Type:** Agreement
- * Vendor or Government (ND) Contract:** Vendor
- * Begin Date:** 01-20-2020
- * End Date:** 02-28-2020
- Action:** Draft (selected), Active, Expired
- Global Access:** (checkbox)
- Manual Disable:** (checkbox)
- System of Record:** BROC
- Organizations:**
 - Entered By Organization:** (dropdown)
 - FS Region Organizations:** (checkbox)
 - Resource Managed Organizations:** Boise Intergency Dispatch Center, Green Mountain Dispatch Center
 - Direct Access Organizations:** Great Plains Intergency Dispatch Center
- DUNS Number:** 117020866
- * Vendor/Government (ND) Provider:** Boise Fireco LLC
- * Contracting Office Provider:** Rock Creek Volunteer Fire Department

At the bottom, there are buttons for 'Submit' and 'Enable Contract'.

- **Update** – Click to save information when editing an existing contract.
- **Complete Draft** – Click to return a contract into an active or inactive state, depending on the contract start/end date. You will not be able to complete the draft if the contract creator indicated that the vendor/government non-dispatch provider could not be found in the list.

The following screenshot shows a new draft contract that has been submitted but not completed or enabled. This essentially means you have saved the information, but the record is not complete. To complete the record but keep it in its draft state, click **Complete Draft**. To complete the draft and enable the contract, click **Enable Contract**. Note that the **Submit** button is now an **Update** button because the record has been created; any new changes are considered updates.

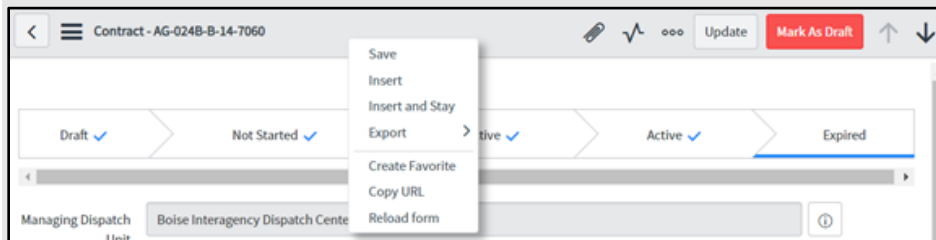
The screenshot shows the 'Contract record' screen for an existing record. The top navigation bar includes 'Draft', 'Not Started', 'Inactive', 'Active', and 'Expired' tabs. The 'Draft' tab is selected. The form contains the following fields and options:

- Managing Dispatch Unit:** Boise Intergency Dispatch Center
- * Contract Number:** AG-BOID-CWN-2020-9523
- * Procurement Type:** Call When Needed
- * Vendor or Government (ND) Contract:** Government
- * Begin Date:** 01-15-2020
- * End Date:** 01-31-2020
- Action:** Draft (selected), Active, Expired
- Global Access:** (checkbox)
- Manual Disable:** (checkbox)
- System of Record:** BROC
- Organizations:**
 - Entered By Organization:** Boise Intergency Dispatch Center
 - FS Region Organizations:** (checkbox)
 - Resource Managed Organizations:** Boise Intergency Dispatch Center
 - Direct Access Organizations:** Boise Intergency Dispatch Center
- DUNS Number:** (empty)
- * Vendor/Government (ND) Provider:** Boise Mobilization Center
- * Contracting Office Provider:** South Central Idaho Supervision

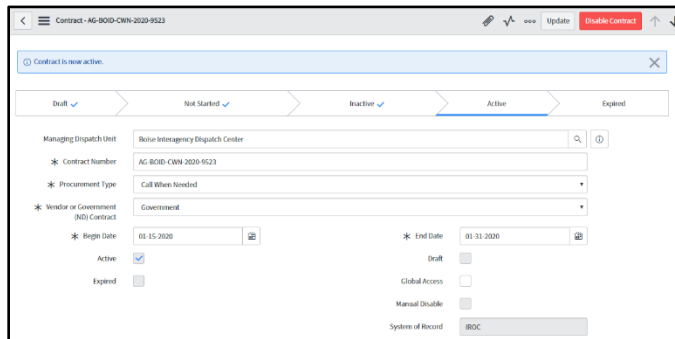
At the bottom, there are buttons for 'Update', 'Complete Draft', and 'Enable Contract'.

- **Mark as Draft** – Once a contract has been enabled, click this to return it to its draft state and make changes.
- **Disable Contract** – Click to remove a contract from being available. Doing so places the contract in an inactive state so that it is no longer available for use. The contract has not been deleted and can be enabled again if needed. (For more information, see [Removing a Contract from Availability](#).)

Note: Throughout the process of creating or modifying a contract, you can right-click in the header bar and click **Save**, **Insert**, or **Insert and Stay** to save your work without submitting the contract.



6. Removing a Contract from Availability



To remove a contract from availability, edit the contract record.

- 1 Search for the desired contract in the Contracts list in the main content frame.
- 2 Click the **Information** icon beside the record and click **Open Record** in the Contract preview screen.
- 3 Click the **Disable Contract** button in the upper-right corner.
 - a Clicking this action button places the contract in inactive status so that it is no longer available for use. The contract has not been deleted and can be re-enabled if necessary.

7. Restoring a Contract

To restore a contract from an inactive state and make it available for use, edit the contract record.

- 1 Search for the desired contract in the Contracts list in the main content frame.
- 2 Click the **Information** icon beside the record and click **Open Record** in the Contract preview screen.
- 3 Click **Enable Contract**.
 - a Clicking this action button places the contract into active status and makes it available for use.
 - b If the contract has expired (the end date has passed), the contract cannot be restored. The restore must occur prior to the end date to enable the contract.

8. Adding or Removing Resource Managed Organizations

To add or remove resource managed organizations, edit the contract record and add or remove organizations as needed.

Note: You must be a dispatch manager at the organizational unit that is the managing dispatch of the contract.

- 1 Search for the desired contract in the Contracts list in the main content frame.
- 2 Click the **Information** icon beside the record and then click **Open Record** in the Contract preview screen.
- 3 In the Organizations tab, click the **Lock** icon to open the **Resource Managed Organizations** list.
- 4 To remove an organization, select it and then click the **Delete** icon.
- 5 To add an organization, choose from the **Search** icon drop-down or type in the search field to perform a type-ahead search.
- 6 *Optional:* You can also click the **Add/Remove Multiple** icon to add or remove multiple organizations at once.
 - a Click the **Add/Remove Multiple** icon to open the Edit Members screen.
 - b Use the filters to search for your desired organizations or type in the search field at the top of the Collection field.
 - c Select one or more organizations in the Collection field and then click the right-pointing arrow to add it to the List field.
 - d To remove an organization, select one or more organizations in the List field and then click the left-pointing arrow to remove it.

Tip: You can use Shift-Click, Ctrl-Click, or Click and Drag to select more than one organization.
 - e When done, click **Save**.
- 7 When done, click **Update**.

9. Adding or Removing Direct Access Organizations

To add or remove direct access organizations, edit the contract record and add or remove organizations as needed.

Note: You must be a dispatch manager at the organizational unit that is the managing dispatch for the contract.

- 1 Search for the desired contract in the Contracts list in the main content frame.
 - 2 Click the **Information** icon beside the record and then click **Open Record** in the Contract preview screen.
 - 3 In the Organizations tab, click the **Lock** icon to open the **Direct Access Organizations** field.
 - 4 To remove an organization, select it and then click the **Delete** icon.
 - 5 To add an organization, choose from the **Search** icon drop-down or type in the search field to perform a type-ahead search.
 - 6 *Optional:* You can also click the **Add/Remove Multiple** icon to add or remove multiple organizations at once.
 - a Click the **Add/Remove Multiple** icon to open the Edit Members screen.
 - b Use the filters to search for your desired organizations or type in the search field at the top of the Collection field.
 - c Select one or more organizations in the Collection field and then click the right-pointing arrow to add it to the List field.
 - d To remove an organization, select one or more organizations in the List field and then click the left-pointing arrow to remove it.
- Tip:** You can use Shift-Click, Ctrl-Click, or Click and Drag to select more than one organization.
- e When done, click **Save**.
 - 7 When done, click **Update**.

10. Adding Resources to a Contract

To add a resource to a contract record, edit the contract record. You can view the resources the vendor has available on the Vendor Resources tab.

Note: Your active dispatch organization must be the managing dispatch of the contract or be designated as an organization managing resources dispatch for the contract.

The screenshot shows the 'Contract Resources' tab for contract 1202481389024. The interface includes sections for Organizations, Activities, and a table of Contract Resources. The 'Contract Resources' table has columns for Resource, Catalog, Category, Dispatch Organization, Provider Organization, and Owner Organization. A 'New' button is visible in the top right of the table area.

- 1 Search for the desired contract in the Contracts list of the main content frame.
- 2 Click the **Information** icon beside the record and then click **Open Record** in the Contract preview screen.
- 3 Select the **Contract Resources** tab at the bottom of the contract record.
- 4 Click **New**.
- 5 Select the **Resource*** that you want to add to the contract.

Note: A resource that has a master roster or is assigned to a position on a master roster cannot be added to a contract.

- 6 Click the **Lock** icon beside **Qualifications** to set the qualifications for this resource. When done, click the **Lock** icon again to save your changes.
- 7 Click **Submit** to add the resources to the contract.

Notes:

When adding resources to contracts:

A resource cannot be added to an exclusive-use contract if already assigned to any other type of contract.

A resource can be added to multiple (non-exclusive use) contracts.

A resource that has a master roster, that is assigned to a position on a master roster, or that is assigned as an alternate to a position on a master roster cannot be added to a contract.

11. Removing Resources from a Contract

To remove a resource from a contract record, edit the contract record. Your active dispatch organization must be the managing dispatch of the contract or be designated as an organization managing resources dispatch for the contract.

- 1 Search for the desired contract in the Contracts list in the main content frame.
- 2 Click the **Information** icon beside the record and click **Open Record** in the Contract preview screen.
- 3 Select the **Contract Resources** tab at the bottom of the contract record.
- 4 Select one or more resources by clicking the checkbox to the left of the resource record in the list.
- 5 Click **Remove Contract Resources**.
 - a A resource that has a master roster or is assigned to a position on a master roster cannot be removed from a contract.